



INDIVIDUAL FUND & IRA INVESTMENTS



What are the advantages of investing in the Individual Fund?

Our Individual Fund and IRA investments offer rates generally higher than comparable CDs and money market investments, while supporting the Methodist Loan Fund.

When was the Individual Fund established? The Individual Fund was established in 1997 so individuals could invest in the Methodist Loan Fund, along with churches. In response to requests from our current and potential investors, TMF began offering Individual Retirement Accounts through the Individual Fund in early 2006.

What is the Methodist Loan Fund? The Methodist Loan Fund serves as the funding source for competitive loans made through TMF to United Methodist churches and agencies considering new construction, capital improvements and expansion of existing facilities to further grow ministries in their communities.

So my Individual Fund or IRA investment is considered an act of Christian stewardship? Definitely. You are earning, saving and giving in the Wesleyan spirit when you invest in the Individual Fund. Yes, your Individual Fund or IRA investment benefits churches in your conference, as well as all six of the annual conferences in Texas and New Mexico, connecting you to other United Methodists across the two states.

What are the requirements for investing in the Individual Fund? Individuals must be 18 years of age and a resident of Texas or New Mexico. We request a minimum investment of \$1,000 for one year.

INDIVIDUAL FUND & IRA RATES

VARIABLE RATE as of 9/1/21*

Current Rate
.40%

FIXED RATES through 9/10/21**

| 1 Year | 2 Year | 3 Year | 4 Year | 5 Year |
|--------|--------|--------|--------|--------|
| .85% | 1.00% | 1.15% | 1.35% | 1.55% |

Past performance is not an indication of future results.

*Variable rates are subject to change monthly.

**Fixed rates are set on a weekly basis.

Variable and 1 through 5-Year fixed rates available.

VISIT WWW.TMF-FDN.ORG FOR CURRENT RATES.

CLICK ON "CHECK OUR CURRENT INVESTMENT RATES" ON OUR HOMEPAGE.

ALL RATES SUBJECT TO CHANGE.

IT'S EASY TO INVEST IN THE INDIVIDUAL/IRA FUND!

Contact Investor Services at 800/933-5502 or visit our web site for current rates, application forms, and more information on an investment that helps you

GROW YOUR INVESTMENT WHILE GROWING THE CHURCH.



METHODIST LOAN FUND

Who benefits from Methodist Loan Fund Investments?

- **Investors** – United Methodist churches and institutions who invest in the Methodist Loan Fund receive competitive rates on an historically safe and stable investment.
- **Loan recipients** who enjoy competitive loan rates and expert guidance from the largest United Methodist church lender in the country.
- **Individuals** – Since loans originated by TMF invest in the future of United Methodist ministries, the individuals served by these ministries receive the ultimate benefit.

Who can invest in the Methodist Loan Fund? This investment vehicle is open to churches, institutions and other non-profit organizations that value the concept of helping United Methodist churches throughout the state while earning exceptional returns.

Are investments in the Methodist Loan Fund insured? No, not through a federal agency. However, MLF funds are secured by a long history of no loss of principal on loans originated by TMF. They are further safeguarded through strict investment and lending policies, strong board leadership, and competent staff. In addition, they are supported by the Foundation’s own \$68 million Undesignated Endowment.

How long are churches required to invest, and how much? We request a minimum investment period of one year with no minimum for church investments in the Methodist Loan Fund.

METHODIST LOAN FUND RATES

VARIABLE RATE as of 9/1/21*

Current Rate
.50%

FIXED RATES through 9/10/21**

| 1 Year | 2 Year | 3 Year | 4 Year | 5 Year |
|--------|--------|--------|--------|--------|
| 1.00% | 1.15% | 1.30% | 1.50% | 1.70% |

Past performance is not an indication of future results.

*Variable rates are subject to change monthly.
**Fixed rates are set on a weekly basis.

Variable and 1 through 5-Year fixed rates available.

VISIT WWW.TMF-FDN.ORG FOR CURRENT RATES.

CLICK ON “CHECK OUR CURRENT INVESTMENT RATES” ON OUR HOMEPAGE.
ALL RATES SUBJECT TO CHANGE.

IT’S EASY TO INVEST IN THE METHODIST LOAN FUND!

Contact Investor Services at 800/933-5502 or visit our web site for current rates, application forms, and more information on an investment that helps you

GROW YOUR INVESTMENT WHILE GROWING THE CHURCH.